



## Summary Training Schedule - *Implementation*

<b><i>Class</i></b>	<b><i>Date(s)</i></b>	<b><i>Audience</i></b>
HANDI Orientation (Watts)	5/26/98	General & Project Accounting Staff
PeopleSoft/PassPort Demo & Walkthrough (Wiprud/Memmolo)	7/8	All General Accounting Staff
Client Server vs. Mainframe Applications (Andros)	8/5	All General Accounting Staff
<i>FY 1999 Startup Workshop (FIN-001) (Various)</i>	<i>8/27 – 9/9</i>	<i>All affected Finance Department staff, other PHMC, DOE-RL CFO, &amp; DCAA</i>
HANDI Reporting (Self Study) (Davis)	8/26	All General Accounting Staff
Effective Dating (Self Study) (Davis)	9/2	All General Accounting, Select Travel, Treasury, & Payroll Staff, Internal Audit
The Big Picture, Session 1 (Thomas/Wiprud)	9/2	All General & Project Accounting Staff, Select Personnel Acct'g Staff, Internal Audit
Automated Project Entries (APE) – I, Session 1 (Davis)	9/2	All General Accounting Staff, Internal Audit
Nuts & Bolts: PS Technical Process (Simjee/Memmolo)	9/10 – 9/11 9/14 – 9/15	Data Control Staff & Select General Accounting Staff
<i>Overview &amp; Demo (Wiprud/Davis/Hopkins)</i>	<i>9/15</i>	<i>Select DOE-RL CFO Staff</i>
How Allocations Work & Setting Up Multi-Code CACNs (Davis)	9/16	Select General & Project Accounting Staff, Internal Audit
Journal Entries into General Ledger, Session 1 (Davis)	9/23, a.m.	All General Accounting Staff
Journal Entries into General Ledger, Session 2 (Davis)	9/23, p.m.	Internal Audit & Payroll/Travel/Treasury Supervisor
<i>HANDI Reporting Exercise (Wiprud)</i>	<i>9/23</i>	<i>All DOE-RL CFO Staff (copy provided to P. Mendez)</i>
<i>The Big Picture, Session 2 (Thomas/Wiprud)</i>	<i>9/25</i>	<i>PHMC CFOs &amp; Financial Managers, Select SP&amp;I Staff</i>
The Big Picture, Session 3	9/30	DOE-RL CFO Staff & DCAA
Automated Project Entries	10/6	General Accounting &

(APE) – I, Session 2 (Davis)		Internal Audit make ups, Select Project Accounting & Accounts Payable Staff
The Big Picture, Session 4 (Thomas/Wiprud)	10/7	Makeups
BMS Financials – System Overview (Simjee)	10/8	Select General Accounting Staff & Core Implementation Team members
APE II & Journal Entries into General Ledger (Davis)	10/14, am	Select Travel, Treasury, Payroll, & Pensions Staff
BMS Financials – System Overview (Simjee)	10/14, pm	Remaining General Accounting Staff
PS-Delivered Online Reports (GL & Projects modules), Session 1 (Davis)	10/15, am	Select Payroll, Travel, Treasury, & AP Staff
PS-Delivered Online Reports (GL & Projects modules), Session 2 (Davis)	10/15, pm	All General Accounting Staff
<i>Insight Demo (Soft Reporting replacement product), Session 1 (Andros)</i>	10/19	<i>Select DynCorp Staff</i>
<i>Insight Demo (Soft Reporting replacement product), Session 2 (Andros)</i>	10/20	General & Project Accounting Staff
Journal Entries into General Ledger, Session 3	10/21, pm <b>Canceled.</b> Holding 1-on-1's instead	AP Staff, Gen'l Acct'g make ups
<i>Insight Demo (Soft Reporting replacement), Sessions 3 &amp; 4 (Andros)</i>	10/27 (schedule announced via BMS Financials bulletin)	<i>Other Finance Dept staff, other PHMC</i>
Query Lab (Simjee)	10/28	General Acct'g Staff
<i>Insight Demo (Soft Reporting replacement), Session 5 (Andros)</i>	10/29 (schedule announced via BMS Financials bulletin)	<i>Other Finance Dept staff, other PHMC</i>
<i>Insight Demo (Soft Reporting replacement) Session 6 (Andros)</i>	11/2, a.m.	<i>DOE-RL CFO Staff</i>
PassPort-PeopleSoft Integration – Overview (Lack/Main)	11/3, a.m.	Select Gen'l Acct'g Staff
<i>Indirect Cost Pool Analysis &amp; Variance Reporting (FIN-004),</i>	11/4	<i>Those with responsibility for analysis of indirect cost</i>

<b>Sessions 1 &amp; 2 (Harris)</b>		<b><i>pools and variance reporting</i></b>
<b><i>Indirect Cost Pool Analysis &amp; Variance Reporting (FIN-004), Session 3 (Harris)</i></b>	<b>11/5, p.m.</b>	<b><i>G&amp;A Analysts</i></b>
<b>Creating Queries (Memmo)</b>	<b>11/10, am &amp; pm</b>	<b>General Accounting Staff, Select Project Acct'g &amp; SP&amp;I Staff</b>
<b><i>Project Reporting &amp; Info Sources (FIN-002) – HANDI only, Insight not available for demonstration(Watts)</i></b>	<b>11/11, 11/12, 11/17, &amp; 11/20</b>	<b><i>All affected Finance Dept staff, other PHMC.</i></b>
<b><i>Insight Demo (Soft Reporting replacement) Session 7 (Andros)</i></b>	<b>11/16</b>	<b><i>DOE-RL CFO Staff &amp; DCAA</i></b>
PassPort-PeopleSoft Integration – Details (Main)	<b>Ongoing</b>	Patty Paetz to contact Terry Main as needed
Month-End Close & Online Entries	<b>11/17, Canceled – documentation only</b>	General Accounting
<b>Automated Project Entries (APE) II &amp; Journal Entries into GL, Session 2 (Davis)</b>	<b>11/17</b>	<b>Make up. Various Finance Dept Staff</b>
<b><i>Project Reporting &amp; Info Sources (FIN-002), special session (Watts)</i></b>	<b>11/20</b>	<b><i>DOE-RL CFO Staff &amp; DCAA</i></b>
<b><i>Project Reporting &amp; Info Sources (FIN-002), special session (Watts)</i></b>	<b>12/1</b>	<b><i>Select DOE-RL SNF Staff. Russ Warren POC</i></b>
<b>Journal Entries, Session 4 (Davis)</b>	<b>12/3</b>	<b>Select Finance Dept Staff</b>
<b><i>Creating and Running Queries (Simjee)</i></b>	<b>12/4</b>	<b><i>Select DOE-RL CFO Staff</i></b>
Month-End Close & Online Entries (Davis/Vodney)	<b>12/8, Canceled – documentation only</b>	Select Project Accounting Staff, Internal Audit
<b><i>Project Reporting &amp; Info Sources (FIN-002), special session (Wiprud)</i></b>	<b>12/9</b>	<b><i>Finance Dept Staff</i></b>
<b>Tree Management (Simjee)</b>	<b>12/10</b>	<b>Gen'l Acct'g &amp; Select SP&amp;I Staff &amp; Finance Dept Staff</b>
<b>Journal Entry Refresher (email with link to desk instruction)</b>	<b>12/15</b>	<b>All attendees of previously held Journal Entry classes</b>
<b>NVision for GL (Simjee)</b>	<b>12/16</b>	<b>Select Finance Dept Staff</b>
<b><i>Indirect Cost Pool Analysis &amp; Variance Reporting (FIN-004), Session 4 (Harris)</i></b>	<b>12/17</b>	<b>Gen'l Acct'g Staff</b>

<b>Journal Entries, 1-on-1 (Davis)</b>	<b>1/13/99</b>	<b>Angie Glidden</b>
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*Not for Finance Department only.*  
**Complete**